Incumbent Worker Training Program (IWTP)
- Customized Training -
<u>**Training Provider Instructions for Quarterly Reports:**</u>
Revised: 05/26/2006

Note: Quarterly Reports are used to track the progress of training projects funded by IWTP and provide a means to track specific information on participants as well as performance standards and expenditures, as outlined in the approved contract. The reports must be completed by Primary Training Providers on a calendar quarterly basis (March 31, June 30, September 30, and December 31) and are due no later than 15 calendar days following the end of each calendar quarter. If training does not begin in the contract effective date calendar quarter, the Primary Training Provider must submit a "Negative Report" with an explanation in the "Comments" section describing the reason why the training project has not begun. A "Negative Report" will be required each quarter until tr aining does begin.

A) The Primary Training Provider must Log-in to the IWTP Customized Training Web site @ **https://IWTP.laworks.net**

B) The Primary Training Provider may then be prompted with a notification of entering a 'secured site' and should respond affirmatively.

C) At the Customized Training Log-in screen the Primary Training Provider is presented with the following options:
1. If the Primary Training Provider is an existing user, he will enter his username and password.
2. If the Primary Training Provider is a new user, he will click on the 'New user?' link.
3. If the Primary Training Provider is an existing user and has forgotten his username, he will clic k on the 'Forgot Username?' link.
4. If the Primary Training Provider is an existing user and has forgotten his password, he will enter his username and click on the 'Forgot Password?' link.
5. If the Primary Training Provider is an existing user and would like to change his password, he will enter his username and password and click on the 'Password Maintenance' link.

New User Account Creation
The Primary Training Provider will be asked if the account will be for a training provider, an employer or a consortium. The Primary Training Provider will then select a username and password, create a secret question and answer to be used for password retrieval should the password be forgotten, provide their first and last names, and their LDOL Training Provider number. The username must be at least six characters long. The password must be at least six characters long, and have at least one number, one uppercase letter and one lowercase letter.

Upon validation of username and password, the Primary Training Provider will select:

1. Select an Application/Contract below (or Enter Case # below)

Selecting an existing application or contract directs the Primary Training Provider to the Customized Training Main Menu.

The IWTP Customized Training Main Menu will consist of the following options:
A. Employer Maintenance
B. Primary Training Provider Maintenance
C. Display Current Status & View Details
D. Quarterly Report Menu
E. Customer Satisfaction Report
F. Amendment Request
G. Revision Request
H. Invoice
I. Scope of Training
J. Current Summary of Line Item Costs
K. View/Print Entire Application
L. Select Another Application/Contract

Note: **Log-Off** is located in the upper right hand corner of the screen(s).

Option A: Employer Maintenance (Allows employers to edit his/their information)

Option B: Primary Training Provider Maintenance (Allows primary training provider to edit his information.)

Option C: Display Current Status & View Details (Tracks status of application)

Option D: Quarterly Report Menu

The Quarterly Reporting Menu Options will consist of items:

> **Item 1:** Display/Print Quarterly Reports Instructions

> ---

> **Item 2:** Select Quarter Ending date for the report that is going to be worked on which will then take you to the Quarter Menu.

>> a: Add/Update Trainee – Adds one Trainee's information at a time. (If the Employer does not want the Training Provider to see the trainees' social security numbers and wage information, there is a box in the Employer (Consortium) Maintenance Option that the Employer can check to keep that information from being displayed to the training provider. Employers who choose this option are responsible for entering each trainee's Social Security Number, Beginning Hourly Salary and Trainee's Current Hourly Salary and the Training Provider will no longer have access to the Batch options. (The employer will have access to the Batch options.)

>>> 1) Enter Trainee's First Name
>>> 2) Enter Trainee's Last Name
>>> 3) Enter Trainee's Social Security Number - numbers without dashes
>>> 4) Enter Trainee's Initial Job Title - Title at time Trainee first entered IWTP training
>>> 5) Enter Trainee's Initial O*Net-SOC Title - O*Net-SOC Title at time Trainee first entered IWTP training.
>>> 6) Enter Trainee's Projected O*Net-SOC Title - O*Net-SOC Title Trainee may have at end of IWTP training.
>>> 7) Enter Trainee's Current O*Net-SOC Title – O*Net-SOC Title Trainee has as of the current quarter.
>>> 8) Enter Trainee's Beginning Hourly Salary - Salary at time Trainee first entered IWTP training
>>> 9) Enter Trainee's Current Hourly Salary or if no longer employed enter hourly wage that trainee was making at time of separation.
>>> 10) Select Status of Training from drop down box - Select one of the following: In Progress - trainee still has scheduled courses to take through current IWTP contract, Completed - trainee has completed all classes, courses seminars, etc. he/she was scheduled to complete in the IWTP contract/application with successful delivery of the training and updated job skills verified by the employer, and Failed to Complete - trainee has not successfully completed all classes, courses, seminars, etc. that he/she was scheduled to complete in the IWTP contract/application.
>>> 11) Select Training Resulted in Retention from drop down box - Select one of the following: Yes - trainee has completed class, course, or seminar that has resulted in the prevention of job loss caused by obsolete skills, technological change, or national or global competition, No - training has not resulted in the prevention of job loss caused by obsolete skills, technological change, or national or global competition, N/A - Training is not required for trainee to retain their current position.
>>> 12) Enter Hrs Trained – Enter number of hours trained for current quarter.
>>> 13) Click Add Trainee to submit that trainee's information. The data entry screen will be blank for another trainee's information to be entered.

>> b: On-line Batch Add/Update Trainees – Adds multiple Trainees' information at one time.

>>> 1) Click drop down box to choose columns to hide or view as needed for convenience
>>> 2) Click Add New Trainee button to add a line for a trainee that will be entered. Add the number of lines for the number of trainees that will be added.
>>> 3) Enter all of the trainees' information on spreadsheet
>>> 4) Click Submit Trainees to batch upload the trainee information. "Batch uploaded successfully" will be displayed in red at the top of the Quarter Menu page when batch upload is completed.

>> c: Off-line Batch Download/Upload Trainee Information – Adds/Updates many Trainees from a spreadsheet form which will be uploaded to the Quarterly Reporting Web-System.

>>> 1) Batch Instructions

2) Download List of Trainees
   a) Click on "Download List of Trainees" to generate a spreadsheet template, which will be blank except for column headings if this is the first time data is entered on the Quarterly Reporting section of the web system. Trainee information already entered into the Quarterly Reporting web system for this contract should be generated on this spreadsheet template.
   b) Copy and paste information into spreadsheet template. Proper format for the Off-line Batch option must be used; i.e. dashes for the social security numbers (###-##-###) and a period for the salaries (#.##). Any other punctuation used on the spreadsheet can cause errors and should not be used. For Column "Status of Training" enter either: I, C, or F which stand for "In Progress, Complete, and Failed to Complete". For Column "Training Resulted in Retention" enter either: Y, N, or N/A, which stand for Yes, No, or Not Applicable. **NOTE**: If the Trainee's SSN needs to be changed, do not use the Off-line Batch. Instead, please change the SSN using the Add/Update Trainee page. (See Item 2.a) **NOTE:** For the job title column of template no more than 40 characters including spaces will be allowed. If job title is more than 40 characters please abbreviate.
   c) Click File and then click Save As. Select appropriate place you would like to save document. Create File name. In the Save as type dropdown box, select the format Text (Tab Delimited).
3) Click the Browse button and go to place on computer or network where spreadsheet file was saved. Select the file then click Open.
4) Click on the Upload button to transfer all information from the file to the web system. (If you have any data that is not in the correct format you will receive an error page. Make these corrections remembering formatting requirement above and re-save your file before repeating steps 3 & 4.) When Upload is complete "Batch uploaded successfully" will be displayed in red at the top of the Quarterly Batch Menu.

d: Add/Update Jobs Created – Follow same instructions above for Add/Update Trainee.

e: On-line Batch Add/Update Jobs Created – Follow same instructions above for On-line Batch Add/Update Trainees.

f: Off-line Batch Download/Upload Jobs Created – Follow same instructions above for Off-line Batch Download/Upload Trainee Information.

g: Customer Satisfaction Report – view only.

h: View/Print Trainee's Quarter Information

i. Verify & Submit Quarterly Report

   1) Answer verification questions
   2) Enter Last Date of Actual IWTP Training for the quarter
   3) Enter Signature Information
      a) Enter Preparer's Name
      b) Enter Preparer's Title
      c) Enter Training Provider's Authorized Representative's Name
      d) Enter Training Provider's Authorized Representative's Title
   4) Enter comments in the box provided
   5) Click Submit

j: Back to Quarterly Reporting Menu

k: Back to Main Menu

Item 3: Date Training Began – Enter date training began then click Submit Date

----

Item 4: Back to Main Menu

Note: Items 2.a., 2.b. and 2.c. include the following choices:
   Click on Back to Quarter Menu
   Click on Back to Quarterly Reporting Menu
   Click on Back to Main Menu

Option E: Customer Satisfaction Menu (Allows entry of Customer Satisfaction Report by Employer)

Option F: Amendment Request (Allows entry of an Amendment Request)

Option G: Revision Request (Allows entry of Revision Requests)

Option H: Invoice (Allows entry of Invoices)

Option I: Scope of Training (Displays Scope of Training)

Option J: Current Summary of Line Item Costs (Displays the Current Summary of Line Item Costs)

Option K: View/Print Entire Application (Displays/Prints Entire Application)

Option L: Select Another Application/Contract (Allows Training Provider to pick another application/contract)

…End of Instructions…